



Scaling Smarter



Proactively Managing Infrastructure for
Sustainable Growth



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Capacity

- ▶ The amount of work or service that you or a team member can accomplish given the amount of time they are available to work
- ▶ Determines your ability to service your existing clients/customers
- ▶ Creates the opportunity to handle new growth and opportunities in your practice



Different Types of Capacity



Producers/Sales

- Generate sales & new clients
- Service levels to deliver to existing clients
- Work Schedule

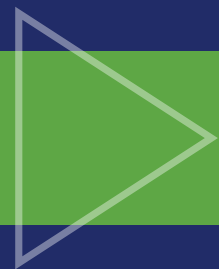


Support

- Specific work to be done for their support position
- Service levels delivered to clients
- Obligations across the business
- Work Schedule



How do you determine capacity today?



Let's Discuss



What are the items you look at to measure capacity on your team?



- ▶ What tells you when you need to hire someone new?
- ▶ How do you know that someone has too much on their plate?
- ▶ Where do you look to figure out what area you need to hire into?
- ▶ How do you match your hiring plan to your growth plans?
- ▶ What would help you better match your hiring and your growth plans?

Understanding Capacity to create growth



- ▶ Be able to clearly identify specific areas for all positions
- ▶ Know the key ratios for each position
- ▶ Identify target ratios to begin to identify the next hire in the right area of your business
- ▶ Know the levers you can pull to maintain capacity in your business

Commit to taking the action identified through this process

Clear expectations for each position/role



Each team member needs to understand:

- ▶ Their role in creating new business
- ▶ Expectations of their delivery for client/customer service experience
- ▶ Time it takes to deliver on the tasks to support the expectations
- ▶ Measurement of success in their position



Know and measure key ratios



Identify & Commit



Know and measure key ratios



- ▷ **Household**
 - to Advisor/Sales-person
 - to Team Member/Total Team
- ▷ **Appointments** per Advisor/Sales-person
- ▷ **Tasks** per Team Member
- ▷ **Revenue**
 - per Advisor/Sales-person
 - per Team Member
- ▷ **Profit**
 - per Advisor/Sales-person
 - per Team Member

Identify the levers you can pull to maintain capacity in your business



- ▶ Identify and drive efficiencies through automation and systematization
- ▶ Sell or give away unproductive households/accounts/customers
- ▶ Hire new team members in production or operations to maintain desired capacity for normal operation of business



Commit to taking the actions



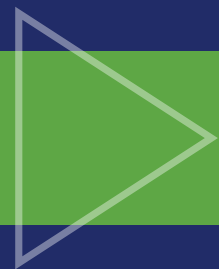
- ▷ Determine the movement that happens in tasks and performance that will drive specific determined actions
- ▷ Identify the ratios that signal when you are approaching action and signal your attention
- ▷ Specify the ratios that will determine capacity for each position and determine the steps to take when these ratios are triggered



Have pre-determined actions at each indicator that are automatically implemented based on the position and needs of the business



What keeps you from taking action?



Your thoughts and perspective



Key areas to examine for support team members

- ▶ Time spent at their work
- ▶ Specific tasks they perform
- ▶ Time spent for each task in a specified period
- ▶ The number of tasks per client for each task in a specified period
- ▶ Number of meetings per specified period that each task would need to be accomplished



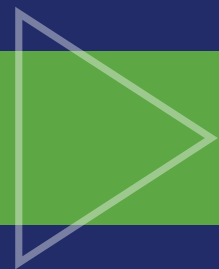
Key areas to examine for producing team members



- ▷ Time spent at their work
- ▷ Number of clients and new clients expected to be brought on over a specified period
- ▷ Number of meetings per client per specific period for client service experience
- ▷ Amount of preparation time per client meeting over a specified period
- ▷ New prospect meeting to new client onboarding for producer



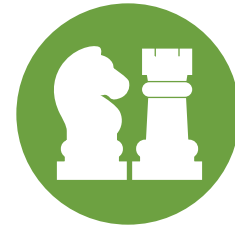
What else would you look at?



Your thoughts and perspective



A Closer Look



Strategic Planning

- Future Focus
- Clear Mile Markers
- Impactful Implementation



Financial Management

- Behind the Numbers
- Identify Opportunities
- Measure Productivity



Succession Planning

- Intentional, Ongoing Care
- Understanding Your Value
- Creating an Impactful Transition



A Closer Look



Operations

- Define
- Automate
- Leverage Technology



Staffing & Compensation

- Job Descriptions
- Knowing When/Who to Hire
- Bonus vs. Incentive Comp



Client Acquisition

- Defining Your Ideal Client
- Inside Out or Outside In?



A Closer Look



**Leadership
Development**



Culture



**Branding
& Marketing**

- Intentional
- Purposefulness





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Let's talk.

